MEET LYDIA ORTEGA

Economist. Educator. Leader.

Resume

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Career Changes

I am running for the office of Lieutenant Governor of California. For over 25 years I have proudly served students at San José State University by challenging them to develop critical thinking skills. For 15 years I have served the faculty of the Department of Economics and the SJSU through extensive fundraising, program innovations, recruitment at all levels, and policy development. I have also served my community, with work on nonprofit boards and as a founding board member of several charitable organizations. I am ready for one more type of service — serving Californians as Lieutenant Governor. The campaign launch date was February 14, 2018. There is a June 5th primary and a November 6th general election. It remains to be seen if there will be a start date.

Innovative Achievements

Typical Chair activities include maintaining a balanced budget *for staffing and capital equipment, managing faculty workload, recruiting faculty and hiring lecturers, meeting enrollment targets, advising students, and working with faculty to assure likelihood of tenure and promotion. Below are my innovative achievements as Chair, Department of Economics, San José State University, August 2001 to 2016*

Restructured the Masters program to replace oral examinations with a comprehensive written examination. Oral exams were labor intensive and thereby constrained our ability to grow. I developed the written examination format and schedule; spread the workload across faculty; and developed procedures that assured integrity in evaluation. We award an average of 20 MA degrees per year and have an enviable record of students advancing to and succeeding in doctoral programs.

Redesigned our introductory courses from a 3-unit lecture course to a 4-unit hybrid consisting of the typical, 3-unit lecture plus 1-unit of online activity. Faculty frustration with lack of student effort in the introductory courses precipitated the change. Options were limited: increasing graded assignments would devour time; there was no space for tutorials, and no money for teaching assistants. My background in computer-based learning attracted marketers of a product developed at Stanford University. The software – a self-graded, online teaching assistant – answered our problems. I designed the hybrid with four features in mind:

1. Maintaining faculty discretion in selecting textbooks and software.

2. Encourage faculty to experiment when new software was developed.

3. Be easy for new and changing lecturers to adopt.

4. Set grading requirements to promoted student usage.

Our 4-unit hybrid introductory classes went into effect in Fall 2004. This was an exceedingly risky venture. Faculty had to train on the software and I had to coordinate with enrollment services to properly link the 3-unit class with its corresponding online activity. I even had to get the University to change the online registration unit caps. One outcome of this change was improved student learning at lower cost in terms of faculty time and university space. Additionally, we became more competitive in the labor market for new professors. I credit the change to a 4-unit hybrid course with increasing publications, increasing mentoring and increasing collegial interactions on teaching effectiveness.

Redesigned our entire undergraduate program to use 4-unit hybrid courses. In Fall 2004, the College of Social Sciences stopped 4-unit changes until the "fallout" from our initiative became clear. When the moratorium ended, three departments adapted their entire programs to 4-unit hybrid courses. Our entire undergraduate program changed to 4 units in Fall 2014. We have the same number of courses but each course requires 4 units of work. Evaluations are preliminary but we find the following:

1. Through pre and post assessment, students consistently report more class work,

2. Student learning improves with a 16-unit semester immersed in economics,

3. A full-time transfer student with 70 units can graduate in three semesters,

4. Working students, taking a 12-unit semester load, perform better because of the lower transactions cost associated with three classes focused exclusively on economics with only economics faculty.

Developed the Department's existing areas of expertise into a fundable market niche. The Department excels in teaching applied economics and specializes in the Austrian and Public Choice schools of economics. I continued to develop this specialization to establish a department identity. It was a risky, unique move for a terminal masters program. Specialization led to the following:

1. Recruitment of superior faculty eager to collaborate in this research environment

2. Higher level of journal and popular press research

3. Name recognition for our program at conferences

4. Domestic and international graduate students attracted by our specialization

Academic discussion increased, faculty gathered on Fridays to argue and have a beer. The faculty codified this activity into what has become our Friday Research Workshop. Increased collegiality extended to peer-pressure to be innovative in teaching. I leveraged this energy into a Best Practices in Teaching Seminar that was regularly held on the First Friday in February. Finally, in the last 10 years we have had two Program Planning reviews, one specifically to evaluate the Department's niche specializations and the other to evaluate the 4-unit hybrid courses. In both cases external reviewers and the University Review committee have complimented the Department, given us high marks.

Specialization led to successful fundraising. Since 2002, I received over $150,000 from four foundations, over $100,000 from three individual donors who commit for three-year periods to an average of $25,000 per year. These are ongoing commitments. We also have eight donors who have committed to $5,000 for five-year periods. The last grant that I worked on concluded with a three-year commitment for $750,000 from an individual donor. This does not include funds from alumni or one-time gifts. We also now have a scholarship fund and a fund specifically for research.

Initiated our highly acclaimed David S. Saurman Provocative Lecture Series in 2001. Professor Jeffrey Hummel ran the program from 2003 to 2008. He did an excellent job attracting top speakers and ran the program smoothly until his sabbatical, when I took over again. I have run the program since then and we have hosted such notables as Nobel Laureate Vernon Smith and former Economic Advisor to President Putin, Andrei Illarionov. It is a lot of work but extremely satisfying to bring compelling speakers to engage students and the community at large. After each lecture, the speaker, faculty, and students meet at a local eatery for pizza, beer, and discussion. This "Barstool Gathering" has grown from a handful of regulars to over thirty guests at each event.

Revived the Council for Economic Education. I discovered that SJSU was one of only three campuses, with a budgeted, line-item for the Council. I found the account, revived the lost program and served as Director for two years. Through trial and error, I discovered we had to change our activities from the traditional – teaching lesson plans, to the inspiring – engaging teachers in professional discourse on economics. Once a year, teachers attend a three-day, two-night retreat to discuss a collection of economic readings. Now teachers contact us to get on the waiting list for these retreats. While serving on the statewide Council for Economic Education, I also discovered that two campuses had a Step-ToCollege Program (high school students in pre-approved and monitored classes receive university credit). I brought the Step-To-College Program to San José State in response to declines in the campus summer-bridge program. I thought importing an existing program would be easy but this was the most complex program to institute. It required outreach to external agencies such as high school teachers and principals and collaboration with internal agencies such as the Bursars office, enrollment services and even health services. After two years of struggle, I created a program that no longer needed my oversight, one that has spread to two other departments, and one that has been run by Professor Tom Means. I enjoy initiating projects but I regard it as a measure of success when I can stop nurturing the program and hand it over to others.

Co-founder of the Mont Hamilton Society. The Mont Hamilton Society started as a handful of business colleagues who gathered regularly to talk about economics. I was introduced to the group and we began to grow with the faculty and other area business professionals that I brought to the gatherings. It was not long before we formed a business-academic partnership and named it after the mountains visible from the windows of the Silicon Valley Capital Club where we host events. I leveraged the Department's Provocative Lecture program to support the Mont Hamilton Society by having our speaker give a luncheon presentation. When there is no guest speaker, the members discuss economic issues based on classic economic readings or contemporary topics presented by one of the faculty members. There are no dues or administrative costs except keeping an email list of over 60 business professionals. Attendance at any event is limited to the first 25 who respond to the announcement. External funding supports faculty and student participation at these luncheons. The program has now grown to be affiliated with the Bastiat Society.

Community Activity

Board Member, Goodwill Services of Silicon Valley, 2016 to present.

Chair Audit Committee, 2018 ongoing
Member of the Finance Audit Committee, 2015 to present.
Review findings of external audits and report recommendations to the Board.

Member of the City of San José Budget Short Fall Advisory Group, September 2007 through January 2008.

This was short-term but intensive work involving review of budgets, documents, and repeated public meetings.

Served on the Board of Directors, Fund Development Chair, of MACLA, Movimiento de Arte y Cultura Latino Americana.

This visual and performance arts center was going through restructuring. My contributions to building this board were related to finance and marketing, Summer 1996 – Spring 1998.

Maintained active collaboration with community colleges.

Advised West Valley Community College, Econ Department Chair on using flipped courses in their 4-unit introductory economics courses. Additionally, served on LDTP committees to assure that Community College and CSU Chairs kept introductory economics courses accessible.

Co-Founding Board Member of the Hispanic Foundation of Silicon Valley and its predecessor the Hispanic Women's Council of Silicon Valley.

Served for three years on the Executive Committee as Chief Financial Officer for the Hispanic Charity Ball. Before the Women's Council became a 501(c) 3 entity, activities were under the umbrella of United Way of Silicon Valley. I was the Finance Officer in charge of reconciling the Council's funds with United Way and executing a successful separation of accounts.

Professional Work

During my tenure as Chair *my professional research focused on grant writing for Department funding and development.*

Principal Investigator: Grant to Research Support Group, 2015. Recognizing that there was a unique group of scholars in the area specializing in international institutional economics, I wrote this grant to facilitate collaboration. The outcome was advancement of their individual work but more importantly, discovery of what makes an effective "support" group. The Research Support Group became an ongoing activity, chaired by Associate Professor Colleen Haight. Faculty, lecturers and graduate students would meet regularly for support, ideas, and hard deadlines to advance research projects.

Fulbright Scholars: My first Fulbright proposal, co-authored with Dr. Rodolfo Gonzalez, brought Professor Carlos Rey from Uruguay to campus from 2003-2004. With Rey's brought Professor Carlos Rey from Uruguay to campus from 2003-2004. With Rey's collaboration, we organized a Latin America Teacher Education Seminar. I wrote grants to pay travel costs for the 15 attendees from 10 different countries. I also organized the location and agenda for the meeting. Our goal was to learn about K-12 teacher-training and economic literacy in these countries. In 2010, I wrote a second proposal to invite Anthony Evans, Associate Professor of Economics at ESCP Europe. This is considered one of the top MBA programs in Europe. Evans was a Fulbright Scholar-in-Residence during the Fall 2011 semester and he gave several invited guest lectures in the College of Business.

Public Speaking Engagements: I make frequent presentations to such local groups as Kiwanis, and Rotary. In 2008, I was a featured speaker for the Silicon Valley Real Estate Investment Association. I was also interviewed by Jordan Mandelberg, Producer, Fox Business on the topic of Investment Opportunities in Silicon Valley. I was on KQED “FORUM” with Michael Kransy on Bailouts. In 2009, I was on ABC’s 20/20 with John Stossel to discuss the stimulus bill. Most recently I was a guest of Stuart Varney’s FOX Business Report.

Funded Studies:

“Patterns in Problem-Solving,” Software development under a grant from the College Curriculum Development Program of the National Science Foundation, received Summer 2000. Evolved to curriculum changes in intermediate microeconomic theory courses.

“Human Capital and Trade”, coauthored with Ludger Schukneckt, formerly of the European Central Bank and Markus Jelitto, of the World Trade Organization, Research conducted at the WTO and completed June 1999. Internal report for the World Trade Organization.

Publications

“Integrating Techniques and Applications in Economics Education” National Social Science Perspectives Journal, Spring 1998.

Review of Industrial Concentration and Performance: A study of the structure, conduct, and performance of Indian industry by Uma S. Kambhampati in *Review of Industrial* Organization, 1998.

“Why Does the Senate Win In Conference Committee? A Stability Explanation,” with L. J. McQuillan, *Public Choice*, April 1996.

Study Guide to Accompany McCormick’s Managerial Economics Prentice Hall, May 1993

“Bicameral Stability in the United States Congress,” *National Social Science Perspectives Journal*, Vol. 3, No. 2 (1993).

“Conference Committee Participation and Party Loyalty” with L. J. McQuillan, *Public Choice*, December 1992.

Review of Concentration and Price by Leonard W. Weiss in *Review of Industrial Organization* 6 (1991).

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Academic Appointments

Elected Chair of the University Council of Chairs and Directors, Spring 2014 – Fall 2015

Member of the President’s Commission on Diversity, 2014 – 2015

Department Chair, San José State University, 2001 to 2016

Actively engaged in University strategic planning:

Member of the University Strategic Planning Council, 2007- 2008

Member of Resource Planning Board, 2006-2007

Served on executive search committees:

Provost

Associate Vice President of Advancement

College of Business Dean – twice

College of Social Sciences Dean – twice

Graduate Coordinator, 2001 to 2016

Sabbatical, Spring 2001 Director of the Center for Economic Education, Fall 1987 – Fall 2001

Member of the Minority Graduate Education Program Proposal Review panel for the National Science Foundation, May 24-25, 1999

Faculty Representative to the Direct Audit Report Program, Spring 1998 – Fall 1998

Acting Chair for the Department of Economics, Summer 1991, 1992, and 1995

Chair, Economics Undergraduate Curriculum Committee, 1992 – 1997

Member of the Center for Employment Training (CET) Technical Committee. Prepared a report evaluating training program, February 28, 1996

Prepared a report, “1995 Survey of the Esselen Nation, Monterey and San Benito Counties,” for L. Wyer, Esselen Nation. This was part of a study submitted to U.S. Congress, May 1995.

Affirmative Action Faculty Development Grant Screening Committee, 1995-1996

Advisory Panel for Teacher Preparation in Social Sciences, 1995-1996, 1998-1999

New Student Orientation, 1995, 1996, and 1997

College of Business Foundation Task Force Committee, 1994-1995

Co-Chair of the Educational Equity College Committee, 1991-1992

College of Social Sciences Curriculum Committee, 1992 to 1997

Ad Hoc Committee to Study Prerequisites for Economics Courses, 1992-1993

Ad Hoc Committee to Consider Formation of Policy Analysis Center, 1992-1993

Faculty – Student Mentor, 1991-1992 and 1992-1993

Education

Ph.D. George Mason University, Fairfax, Virginia, Economics – 1987.

M.A. George Mason University, Fairfax, Virginia, Economics – 1985.

B.S. Loyola Marymount University, Los Angeles, Economics – 1980.

Positions

Professor, Department of Economics, San José State University, 2000- to present

Associate Professor, Department of Economics, San José State University, 1995 – 2001

Visiting Scholar, Summer 1993, Instituto Ecuatoriano de Economia Politica, Ecuador

Assistant Professor, Department of Economics, San José State University, 1989 – 1995

Assistant Professor, Department of Economics, George Mason University, 1988 – 1989

Lecturer, Department of Economics, George Mason University, 1987 – 1988

Other

Serve on the General Advisory Board of a new nonprofit, the Ethiopian American Development Foundation. This exciting 501(c)3 organization was established by a former student. The organization seeks to onboard new Ethiopian immigrants to American institutional concepts such as free markets and the rule of law, and will train in social norms to facilitate a smooth and quick transition to an otherwise complex social and economic system. Education and improved earning opportunities are expected outcomes. 2018 and ongoing.

Founding Board Member of tech start-up, Web-Wizzy. Serving on a for-profit start-up has been like riding a roller coaster – the real old fashioned, teeth-rattling, wooden ones, not a VR ride. I have assisted in operations but have also served as the number one test subject for the new fitness app EfitX. Under development for two years, EfitX.com launched on March 1, 2018. This fitness app enabled my transformation from out-of-shape academic to an award-winning power lifter. I am now also a member of the USA Power Lifting Association and have qualified for the Power lifting Nationals competition to be held October 13, 2018. Power lifting: 2017 and ongoing.

Member of the Mont Pelerin Society. This academic organization, started by Mises, Hayek, and Friedman, is limited to 500 members worldwide. Ongoing membership.